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## Ukraine

## Oilseeds and Products

## Annual

## 2004

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**Report Highlights:**

Oilseed production in Ukraine in 2004 is expected to decrease slightly following last year's record sunflower crop. Lower production and crush will result in lower exports of sunflowerseed and oil while vegetable oil consumption is anticipated to increase reflecting higher consumer incomes. U.S. soybean meal will most likely continue to lose market share in Ukraine in MY 2004/2005 due to strong price competition from South American and Western European suppliers, despite a forecasted increase in import demand.

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Includes PSD Changes: Yes  
Includes Trade Matrix: Yes  
Annual Report  
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[UP]

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## Executive Summary

Ukraine's total oilseed production in 2004 is forecast to decline due to lower than anticipated area under sunflowerseed. Soybean and rapeseed production is expected to increase as compared with the previous year. Due to the lower production forecast, oilseed crush will decline by an estimated 2% in MY 2004/2005 as compared with the revised estimate of the current marketing year. Sunflowerseed meal and oil production will remain nearly unchanged from MY 2003/2004 levels due to improved efficiency in oilseed extraction.

Domestic consumption of meal and oil in MY 2004/2005 will increase following increasing demand from the poultry industry and growing consumer incomes. Soybean meal, palm oil and coconut oil will remain the main oilseed products imported into Ukraine in MY 2004/2005. Unfortunately, U.S. producers are unlikely to benefit from the anticipated rise in soybean meal imports due to increasing share and price competition from Argentina and Brazil. Ukraine's sunflowerseed, sunflowerseed oil and soybean exports will decline in MY 2004/2005 while exports of rapeseed and sunflowerseed meal should increase with the EU and Turkey being major destinations.

In MY 2004/2005, Ukraine will continue to protect its markets for sunflowerseed, soybean oil and rapeseed oil by imposing prohibitive import duties. The existing 17% export duty on sunflowerseed will protect the domestic oilseed processing industry from unwanted competition from domestic sunflowerseed exporters.

## Production

### Oilseeds

**Sunflowerseed.** Post's initial 2004 production forecast (see Sunflower Seed PSD Table) assumes that farmers will decrease the area under sunflower and is based on average yield expectations (ten-year average sunflower seed yield excluding the highest and lowest results). While sunflowerseed remains the most profitable crop for Ukrainian farmers (see table on Grains, Sugar Beets and Sunflowerseed Profitability in the Statistical Tables section), the area planted in 2004 is expected to decline as compared with the previous year. The main reason behind lower expected sunflowerseed plantings in 2004 is insignificant winter wheat kill in 2003/2004. This has resulted in much lower re-sowing this spring as compared with 2003. Post estimates that approximately 0.5 million hectares from 5.4 million hectares of perished winter wheat, barley and rapeseed in 2003 was replanted with sunflowerseed.

Generally favorable weather conditions have allowed farmers to start planting sunflowerseed earlier this year as compared with 2003. Sunflowerseed sowing pace in Central and Southern Oblasts, Ukraine's major production areas, is similar to that of 2002 when average temperatures during April 1-20 exceeded the norm by 1 to 5 degrees Celsius. According to official sources, farmers planted 1.8 million hectares of sunflowerseed as of April 27, 2004, in contrast with 866,000 hectares planted by the same date last year.

The GOU once again declared its intention to limit the area under sunflowerseed this year. It is doubtful, however, that the Ministry of Agricultural Policy of Ukraine will succeed in its efforts to restrict this area to 2.5 million hectares – the official forecast for 2004. The 2.5 million hectare forecast is explained by conventional crop rotation beliefs requiring a minimum of seven years between plantings of sunflowerseed. The rationale behind this guidance is the prevention of fungal diseases and nutrient depletion and the retention of soil moisture. The seven-year rotation assumes that farmers use non-resistant sunflower varieties and apply very little fertilizer. With the fall of the command system in agriculture, Ukrainian authorities have been unable to restrict sunflowerseed area to the targeted levels.

A record high area of 4 million hectares was planted to sunflowerseed in 2003 as Ukraine's farmers re-sowed winter grain area devastated by winterkill to the most profitable alternative. This contrasts with the GOU's early pre-planting forecast of 2.45 million hectares for sunflowerseed.

**Soybean production in 2004** is expected to continue to increase due to growing domestic utilization and anticipated import demand from near-by markets, mainly Turkey and the EU-25. No data is available on soybean production profitability for Ukraine. It is assumed that soybeans are sufficiently profitable as there has been a rapid expansion of soybean harvested area from 13,520 hectares in 1997 (lowest on record) to 188,260 hectares in 2003 (record high). This is despite the fact that average yields in Ukraine are about half that of the United States, Brazil and Argentina.

Soybeans are produced on non-irrigated land in Central Ukraine and on irrigated land in Southern Ukraine. There is potential for further expansion of soybean area beyond 2004 due to the availability of at least 300,000 hectares of idle irrigated land in Southern Ukraine. There is also the potential for planting new early varieties that would allow soybeans to reach full maturity in Central Ukraine.

**Rapeseed production in 2004** is forecast to recover from the previous year's level. However, production will likely remain below the levels achieved in 2000-2002. Post's forecast of total rapeseed production (winter and spring crops) in 2004 is based on the expectation that 80,000 hectares of winter rapeseed and 60,000 hectares of spring rapeseed will be harvested at average yields.

Farmers reduced plantings of winter rapeseed in Fall 2003 to 91,000 hectares as compared with 159,000 hectares planted one year ago. This was due to scarcity of quality seed, dry weather conditions and, to a lesser extent, because of the recent experience in 2002/2003 when unprecedented damage from low temperatures and ice crust killed 95% of Ukraine's winter rapeseed.

**Sunflowerseed, soybean and rapeseed production estimates for 2003** were adjusted to reflect the final statistics published by the SSCU. The soybean production estimate for 2003 was reduced due to lower reported final harvested area and yields. The rapeseed production estimate was increased as a result of higher area harvested and yields.

## Meals and Oils

Total oilseed crush (sunflower, soybean and rapeseed) will decline by an estimated 2% in MY 2004/2005 as compared with the revised estimate of the current marketing year as higher than anticipated soybean and rapeseed processing will not fully offset lower sunflowerseed crush. Despite the forecasted decrease in sunflowerseed production and crush in MY 2004/2005, it is expected that sunflower meal and oil production will not differ significantly from the level of the current marketing year. **Increased crush capacity will likely result in lower on-farm crush and higher oil and meal extraction rates in MY 2004/2005 as compared with previous years.**

The estimates for soybean and rapeseed meal and oil production in **MY 2003/2004** were adjusted to reflect the revised availability of both oilseeds for crushing.

## Crush Capacity Expansion

**The total sunflowerseed crush capacity of Ukraine's oilseed industry will likely expand by an estimated 200,000 tons per year in MY 2004/2005, or by 5% from**

**the existing level.** The Dnipropetrovsk Oil Extraction Plant (Bunge), Kyrovograd Oliya (Ukrainian Grain Trading Company) and Poltava Oil Extraction Plant (Kernel Group) intend to modernize and expand their existing processing capacities. In addition to the upgrading of existing facilities, it is expected that a brand new facility will become operational at the Mykolaiyv River Port Oil Extraction Plant in MY 2004/2005.

**Expected Soybean Processing Capacity Expansion in MY 2005/2006.** Out of 25 industrial oilseed processing factories inherited by Ukraine after the break up of the Soviet Union in 1991, only three solvent extraction plants were capable of crushing large volumes of soybeans. Since then, a number of small soybean crushing plants that do not utilize solvent extraction have been built. It is doubtful that the three original plants will return to soybean processing in the near future as they mainly crush sunflowerseed. Two foreign private investors are considering the construction of soybean crushing plants in the Ports of Illichivsk (located South of Odessa) and Reni (located in the Danube's delta) to address the expected increase in regional soybean meal demand from Ukrainian and Russian compound feed producers. Both projects intend to utilize imported soybeans from South America and the United States and to re-export some meal and oil to other FSU countries. **If these two processing facilities become operational, they will have an estimated crushing capacity of 1.5 million MT of soybeans per year. These new facilities are not expected to be completed before MY 2005/2006.** The Dutch division of ADM only recently received permission from the Ukrainian Anti-Monopoly Committee to acquire a controlling share in the Illichivsk Oil Extraction Project. None of the new construction projects have actually yet begun.

**Current Processing Capacity Level.** According to the Ukrainian Vegetable Oil and Fats Producers Association, *Ukroliya*, as of the end of April 2004, the country's crush capacity increased to 3.9 million tons per year (sunflowerseed equivalent), or by 400,000 tons over the same period last year. This was mostly due to the opening of two new crushing plants. Myronovskiy Khleboproduct, the largest broiler meat producer in Ukraine, opened a new plant capable of processing 620 MT of sunflowerseed per day. The plant is co-located with the company's feed mill in Kiev Oblast. The other crushing plant that opened in 2003 belongs to Agroexport Ltd, one of the leading Ukrainian grain and oilseed traders. The plant is located in the River Port of Mykolaiyv and is positioned to export sunflower oil and meal via the Black Sea. Its current crush capacity is 500 tons of sunflowerseed per day.

## Consumption

### Meal

MY 2004/2004 feed utilization of oilseed meal is expected to increase due to growing feed demand from Ukraine's poultry industry. The estimate of soybean meal consumption for the current marketing year was reduced as it is unlikely that expensive imported soybean meal will fully compensate for the lower soybean crush. The later number was revised downwards due to massive soybean exports from Ukraine in September 2003-February 2004 (see note at the end of Soybeans Export Trade Matrix).

### Oil

Human consumption of vegetable oils and fats in MY 2004/2005 is forecast to increase in response to rising consumer incomes. Sunflowerseed oil will remain the most preferred vegetable oil by Ukrainians in MY 2004/2005 while soybean and rapeseed oil will continue to be utilized mainly for margarine and mayonnaise production.

Assessing the level of vegetable oil consumption in Ukraine remains a challenging task. The State Statistics Committee of Ukraine (SSCU) utilizes two different approaches in determining per capita consumption. The first (traditional) approach derives human consumption as a residual from estimates of production, trade and stocks. Using this approach, the SSCU determined that an average Ukrainian consumed 10.7 kilograms of vegetable oil in CY 2002 (see Per Capita Vegetable Oil Consumption in Ukraine table). This estimate is in line with Post's own human consumption estimate derived from the PSD tables.

The second approach employs a sample survey methodology that has been used to determine household expenditures on food items, including various types of vegetable fats (see table on Monetary Expenditures of Ukrainian Households on Animal and Vegetable Fat Purchases in CY 2002). The data derived using the sample survey results may suggest that per capita consumption of sunflowerseed oil alone (16.05 kilograms per year) exceeded all vegetable oil per capita food use (10.7 kilogram) by 50% in CY 2002. Some analysts in Ukraine have used survey results to justify higher than official production estimates for sunflowerseed oil, and, correspondingly, for sunflowerseed. If Post were to agree with the 16.05 kg/person/year estimate, MY 2001/2002 sunflower oil production estimates should have increased by at least 300,000 MT. That would have required 750,000 MT of additional sunflowerseed production. **Post believes that until the SSCU improves the sample survey methodology and eliminates the difference between the two conflicting per capita consumption estimates, the first approach should be used.**

## Trade

### Oilseeds

**Sunflowerseed.** Exports of sunflowerseed in MY 2004/2005 are forecast to decline significantly. Lower than anticipated availability of sunflowerseed and higher demand from next marketing year's expanded crushing capacity will cause domestic prices to increase as compared with MY 2003/2004. For MY 2004/2005, higher domestic prices coupled with the existing 17% export duty will most likely make sunflowerseed exports less attractive than domestic processing. About 50% of Ukraine's anticipated sunflowerseed exports in MY 2004/2005 will be destined for the EU. The remaining quantity will be exported to Turkey.

**Soybean exports** in MY 2004/2005 are expected to drop from the revised current marketing year level due to higher forecasted domestic crush and will continue primarily to the EU-25 and Turkey. Relatively low export prices (see Soybean Prices table) and close proximity to buyers make Ukrainian soybeans competitive. The soybean export estimate for MY 2003/2004 was increased based on recently available trade data (see note under Soybean Export Trade Matrix).

**MY 2004/2005 rapeseed exports** should increase significantly, reaching the level of MY 2000/2001. Following EU Enlargement, it has been estimated that 85% of Ukraine's rapeseed exports will be directed to the EU-25 due to strong import demand from its biodiesel industry. The MY 2003/2004 export estimate has been increased slightly to reflect higher exports to date to Hungary and Latvia.

**Exports of sunflower meal are also forecast to increase in MY 2004/2005 with the EU remaining as the major buyer.** Despite EU Enlargement, the new member states (NMS) will likely continue to experience a feed protein deficit in the near future. Therefore, an estimated 80% of Ukraine's sunflowerseed meal exports to the EU-25 in MY 2004/2005 will be directed to the NMS.

Soybean meal, palm oil and coconut oil will remain the main oilseed products imported into Ukraine in MY 2004/2005. **Soybean meal** imports are forecast to increase in MY 2004/2005 to meet growing domestic demand. Unfortunately, the United States will continue to lose soybean meal import market share due to price competition (see Soybean Meal Import Trade Matrix). U.S. soybean meal is currently higher priced than product supplied from Brazil, Argentina and the EU. (Please refer to the tables on Soybean Meal Prices and Average CIF Prices by Suppliers in the Statistical Tables Section.)

Exports of crude **sunflowerseed oil** are anticipated to decrease slightly reflecting lower production and higher domestic consumption in MY 2004/2005 and will be mostly directed to traditional markets in the Mediterranean Basin, Russia, other FSU countries and the EU.

CY trade data, including trade with the United States, has been updated to match the final Ukrainian statistics. Post revised estimates of trade with the EU for MY 2002/2003, MY 2003/2004 and MY 2004/2005 to account for trade with the NMS.

Footnotes for the trade matrices in the Statistical Tables Section contain the most recent information on year-to-date trade totals as compared with the same period in MY 2002/2003.

### Stocks

MY 2004/2005 ending stocks of sunflowerseed are anticipated to decrease from the current marketing year level while sunflower meal and oil stocks are expected to remain unchanged. There is no official statistics on stocks for oilseeds and products published in Ukraine.

### Policy

In MY 2004/2005, Ukraine will continue to protect its sunflowerseed, soybean and rapeseed oil markets by imposing prohibitive import duties ranging from EUR 150/MT for rapeseed oil to EUR 800/MT for sunflowerseed oil. Imports of palm oil, coconut oil and soybean meal will enjoy a 0% import duty.

Most likely, the existing 17% export duty on sunflowerseed will remain in place in MY 2004/2005 in order to protect the domestic oilseed processing industry from unwanted competition from sunflowerseed exporters. No other sector/product specific support policies have been utilized in Ukraine. There are no policies aimed at supporting prices for oilseeds and products (such as floor or interventions prices, production quotas, etc).

### References

**Oilseeds and Products reports submitted by FAS-Kiev** can be downloaded from FAS' web site at <http://www.fas.usda.gov/scriptsw/attacherep/default.asp>:

Internet sources (available in English):

#### News and analytical agencies

APK- Inform <http://www.agrimarket.info/>  
Agroperspectiva <http://www.agroperspectiva.com/en/>  
Ukragroconsult Ltd <http://www.ukragroconsult.com/new/eng/>  
ProAgro <http://www.proagro.com.ua/eng/news/>

**National Vegetable Oil and Fats Producers Association Ukroliya**(in Russian only)

<http://www.ukroliya.kiev.ua/>

**Ukrainian official customs statistics** (available only at HS-2 product value basis)

[http://www.customs.gov.ua/ukr/index.php?r\\_id=12&p\\_id=17](http://www.customs.gov.ua/ukr/index.php?r_id=12&p_id=17)



## Statistical Tables

**Rate of Return on Investment in Grain, Sugar Beet and Sunflower Seed  
Production in Ukraine in 2000-2003, %**

	2000	2001	2002	2003
Grains	65	44	20	19
Sugar Beets	7	1	-7	9
Sunflower seed	57	70	78	81

Source: Publication of the Agricultural Policy for Human Development Project in Ukraine issued in March 2004 entitled "Agrarnyi Sector Ekonomiky Ukrainy" v 2003, p. 6.

**Oilseeds Production in 2003, 1,000 hectares, 1,000 MT**

	Corrected final sown area	Area harvested	Production, final weight	Yield, MT/ha
Sunflower seed	4001.17	3807.51	4252.03	1.12
Flax seed	15.05	12.97	10.9	0.84
Soybeans	209.23	188.26	231.78	1.23
Mustard	181.95	133.38	68.53	0.51
Camelina	4.22	3.64	2.1	0.58
Winter rapeseed	6.14	5.13	3.85	0.75
Spring rapeseed	62.48	48.93	47.01	0.96
Peanuts	0.08	0	0	-

Data source: State Statistics Committee of Ukraine

**Per Capita Vegetable Oil Consumption in Ukraine, kg**

1998	1999	2000	2001	2002
8.3	9.0	9.4	10.0	10.7

Source: State Statistics Committee of Ukraine

**Monetary expenditures of Ukrainian households for animal and vegetable fat  
purchases in CY 2002 (per 100 households)**

Products	Quantity, kg	Value, UAH	Price, UAH/kg	Value, \$	Price, \$/kg	Total country consump, MT	Per capita consumpt. kg/year
Butter	686	6,895	10.05	\$1,294	\$1.89	125,232	2.60
Butter oil and other similar fats	4	41	11.67	\$8	\$2.19	642	0.01
Margarine and margarine products	1,442	5,889	4.08	\$1,106	\$0.77	263,139	5.45
Olive Oil	1	13	21.89	\$2	\$4.11	105	0.002
Sunflower Seed Oil	4,243	18,735	4.42	\$3,517	\$0.83	774,437	16.05
Other Vegetable Oils	16	92	5.66	\$17	\$1.06	2,985	0.06
Pork Fat	1,576	13,649	8.66	\$2,562	\$1.63	287,563	5.96
Other Animal Fats	160	929	5.79	\$174	\$1.09	29,275	0.61

Data sources: State Statistics Committee of Ukraine, National Bank of Ukraine, FAS-Kiev calculations Note: Due to sample survey methodology changes, CY 2001 data is not comparable with CY 2002 data.



## Sunflower Seed PSD Table

Ukraine Oilseed, Sunflowerseed							
	2002	Revised	2003	Estimate	2004	Forecast	UOM
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	
Market Year Begin		09/2002		09/2003		09/2004	MM/YYYY
Area Planted	2834	2834	4000	4000	0	3500	(1000 HA)
Area Harvested	2720	2720	3800	3807	0	3200	(1000 HA)
Beginning Stocks	5	5	25	25	26	28	(1000 MT)
Production	3270	3270	4250	4252	0	3500	(1000 MT)
MY Imports	1	1	1	1	0	1	(1000 MT)
MY Imp. from U.S.	0	0	0	0	0	0	(1000 MT)
MY Imp. from the EC	0	1	0	1	0	1	(1000 MT)
TOTAL SUPPLY	3276	3276	4276	4278	26	3529	(1000 MT)
MY Exports	331	331	900	900	0	300	(1000 MT)
MY Exp. to the EC	140	158	200	540	0	150	(1000 MT)
Crush Dom. Consumption	2800	2800	3200	3200	0	3070	(1000 MT)
Food Use Dom. Consump.	30	30	30	30	0	30	(1000 MT)
Feed,Seed,Waste Dm.Cn.	90	90	120	120	0	110	(1000 MT)
TOTAL Dom. Consumption	2920	2920	3350	3350	0	3210	(1000 MT)
Ending Stocks	25	25	26	28	0	19	(1000 MT)
TOTAL DISTRIBUTION	3276	3276	4276	4278	0	3529	(1000 MT)
Calendar Year Imports	0	0	0	0	0	0	(1000 MT)
Calendar Yr Imp. U.S.	0	0	0	0	0	0	(1000 MT)
Calendar Year Exports	350	556	450	924	0	300	(1000 MT)
Calndr Yr Exp. to U.S.	0	0	0	0	0	0	(1000 MT)

## Sunflower Seed Export Trade Matrix

Time Period	Sept.-Aug.	Units:	1 MT
Exports for:	MY 2001/2002		MY 2002/2003
U.S.	0	U.S.	0
Others		Others	
Turkey	31,145	Turkey	83,258
Netherlands	15,592	Spain	49,329
Portugal	5,901	Netherlands	38,379
Spain	5,236	Pakistan	31,268
Russian Federation	3,494	France	29,069
Syria	3,285	Italy	21,019
Poland	2,879	Romania	10,088
Romania	2,855	Georgia, Republic of	15,276
Lebanon	2,699	Russian Federation	8,252
Israel	2,092	Switzerland	7,963
Total for Others	75,178	Total for Others	293,901
Others not Listed	81,726	Others not Listed	330,776
Grand Total	156,904	Grand Total	624,677

Data Source: State Statistics Committee of Ukraine

Note: Sunflowerseed exports increased from 114,621 MT in Sep. 02-Feb. 03 to 723,038 MT in Sep. 03-Feb. 04

**Sunflower Seed Prices Table**

Prices in	US\$	per uom	1 MT
Year	2003	2004	% Change
Jan	230.64	261.67	13%
Feb	230.57	290.81	26%
Mar	217.45	286.15	32%
Apr	220.29	274.92	25%
May	249.39		
Jun	296.28		
Jul	300.09		
Aug	178.19		
Sep	178.18		
Oct	237.25		
Nov	230.68		
Dec	214.76		

Data source: APK-Inform ([www.agrimarket.info](http://www.agrimarket.info)); Prices as of last Friday of each month  
Please refer to GAIN Report #UP2011 for previous years' price information

**Soybeans PSD Table**

<b>Ukraine</b>							
<b>Oilseed, Soybean</b>							
	2002	Revised	2003	Estimate	2004	Forecast	UOM
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	
Market Year Begin		09/2002		09/2003		09/2004	MM/YYYY
Area Planted	108	108	209	209	0	250	(1000 HA)
Area Harvested	98	98	190	188	0	220	(1000 HA)
Beginning Stocks	1	1	2	2	3	3	(1000 MT)
Production	125	125	250	232	0	250	(1000 MT)
MY Imports	1	1	1	1	0	1	(1000 MT)
MY Imp. from U.S.	0	0	0	0	0	0	(1000 MT)
MY Imp. from the EC	0	0	0	0	0	0	(1000 MT)
TOTAL SUPPLY	127	127	253	235	3	254	(1000 MT)
MY Exports	7	7	20	60	0	30	(1000 MT)
MY Exp. to the EC	0	4	0	35	0	15	(1000 MT)
Crush Dom. Consumption	100	100	210	152	0	195	(1000 MT)
Food Use Dom. Consump.	0	0	0	0	0	0	(1000 MT)
Feed,Seed,Waste Dm.Cn.	18	18	20	20	0	25	(1000 MT)
TOTAL Dom. Consumption	118	118	230	172	0	220	(1000 MT)
Ending Stocks	2	2	3	3	0	4	(1000 MT)
TOTAL DISTRIBUTION	127	127	253	235	0	254	(1000 MT)
Calendar Year Imports	10	13	10	1	0	1	(1000 MT)
Calendar Yr Imp. U.S.	0	11	0	0	0	0	(1000 MT)
Calendar Year Exports	0	3	0	42	0	50	(1000 MT)
Calndr Yr Exp. to U.S.	0	0	0	0	0	0	(1000 MT)

**Soybean Export Trade Matrix**

Time Period	Sept.-Aug.	Units:	1 MT
Exports for:	MY 2001/2002		MY 2002/2003
U.S.	0	U.S.	0
Others		Others	
Canada	20	Netherlands	3,045
United Kingdom	20	Moldova	2,946
		Hungary	878
		Lithuania	310
		Belarus	123
		Russian Federation	2
Total for Others	40		7,304
Others not Listed			0
Grand Total	40		7,304

*Data Source for MY 2002/2003: State Statistics Committee of Ukraine; Post's own estimates for MY 2001/2002.*

Note: Ukraine exported 50,246 MT of soybeans in Sep. 03-Feb. 04 as compared with 5,189 MT exported in Sep. 02-Feb. 03.

**Soybeans Prices Table**

Prices in	US\$	per uom	1 MT
Year	2003	2004	% Change
Jan	252.62	255.09	1%
Feb	238.01	249.98	5%
Mar	239.70		
Apr	250.00		
May	-		
Jun	-		
Jul	-		
Aug	-		
Sep	-		
Oct	-		
Nov	227.23		
Dec	247.94		

*Average monthly FOB export prices*

*Data Source: State Statistics Committee of Ukraine.*

## Rapeseed PSD Table

Ukraine							
Oilseed, Rapeseed							
	2002	Revised	2003	Estimate	2004	Forecast	UOM
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	
<b>Market Year Begin</b>		07/2002		07/2003		07/2004	MM/YYYY
<b>Area Planted</b>	174	174	265	265	0	170	(1000 HA)
<b>Area Harvested</b>	70	70	50	54	0	140	(1000 HA)
<b>Beginning Stocks</b>	1	1	1	1	1	1	(1000 MT)
<b>Production</b>	61	61	40	51	0	120	(1000 MT)
<b>MY Imports</b>	0	0	0	0	0	0	(1000 MT)
<b>MY Imp. from U.S.</b>	0	0	0	0	0	0	(1000 MT)
<b>MY Imp. from the EC</b>	0	0	0	0	0	0	(1000 MT)
<b>TOTAL SUPPLY</b>	62	62	41	52	1	121	(1000 MT)
<b>MY Exports</b>	22	22	25	30	0	70	(1000 MT)
<b>MY Exp. to the EC</b>	2	16	2	22	0	60	(1000 MT)
<b>Crush Dom. Consumption</b>	35	35	13	19	0	45	(1000 MT)
<b>Food Use Dom. Consump.</b>	0	0	0	0	0	0	(1000 MT)
<b>Feed,Seed,Waste Dm.Cn.</b>	4	4	2	2	0	4	(1000 MT)
<b>TOTAL Dom. Consumption</b>	39	39	15	21	0	49	(1000 MT)
<b>Ending Stocks</b>	1	1	1	1	0	2	(1000 MT)
<b>TOTAL DISTRIBUTION</b>	62	62	41	52	0	121	(1000 MT)
<b>Calendar Year Imports</b>	0	0	0	0	0	0	(1000 MT)
<b>Calendar Yr Imp. U.S.</b>	0	0	0	0	0	0	(1000 MT)
<b>Calendar Year Exports</b>	21	21	25	26	0	70	(1000 MT)
<b>Calndr Yr Exp. to U.S.</b>	0	0	0	0	0	0	(1000 MT)

## Rapeseed Export Trade Matrix

Time Period	July - June	Units:	1 MT
<b>Exports for:</b>	<b>MY 2001/2002</b>		<b>MY 2002/2003</b>
<b>U.S.</b>	<b>0</b>	<b>U.S.</b>	<b>2,395</b>
Others		Others	
Germany	16,662	Hungary	6,499
Netherlands	7,645	Lithuania	5,800
India	7,568	Estonia	1,844
France	7,402	Switzerland	1,801
Switzerland	4,015	India	1,398
Estonia	3,963	Netherlands	1,151
Bangladesh	3,350	Austria	999
Lithuania	3,027	Yugoslavia	402
Austria	2,811	Poland	155
Nepal	2,481	United Kingdom	19
<b>Total for Others</b>	<b>58,924</b>		<b>20,068</b>
Others not Listed	8,915		31
<b>Grand Total</b>	<b>67,839</b>		<b>22,494</b>

Data Source: State Statistics Committee of Ukraine

Note: Rapeseed exports in Jul. 02-Feb. 03 increased from 22,298 MT to 28,402 MT in Jul. 03-Feb. 04

Rapeseed Prices Table

Prices in	US\$	per uom	1 MT
Year	2003	2004	% Change
Jan	187.52	251.36	34%
Feb	187.46	251.41	34%
Mar	187.46	251.44	34%
Apr	187.48	251.46	34%
May	187.51		
Jun	187.52		
Jul	230.69		
Aug	243.83		
Sep	251.33		
Oct	251.32		
Nov	251.31		
Dec	251.34		

Export CPT Ukrainian Port Prices for Low Erucic Acid Rapeseed

Data source: APK-Inform ([www.agrimarket.info](http://www.agrimarket.info)); Prices as of last Friday of each month

Sunflower Seed Meal PSD Table

Ukraine Meal, Sunflowerseed							
	2002	Revised	2003	Estimate	2004	Forecast	UOM
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	
Market Year Begin		09/2002		09/2003		09/2004	MM/YYYY
Crush	2800	2800	3200	3200	0	3070	(1000 MT)
Extr. Rate, 999.9999	0.4107	0.4107	0.4063	0.4063	0.0000	0.4300	(PERCENT)
Beginning Stocks	2	2	4	4	4	4	(1000 MT)
Production	1150	1150	1300	1300	0	1320	(1000 MT)
MY Imports	0	0	0	0	0	0	(1000 MT)
MY Imp. from U.S.	0	0	0	0	0	0	(1000 MT)
MY Imp. from the EC	0	0	0	0	0	0	(1000 MT)
TOTAL SUPPLY	1152	1152	1304	1304	4	1324	(1000 MT)
MY Exports	848	848	950	950	0	960	(1000 MT)
MY Exp. to the EC	0	420	70	640	0	650	(1000 MT)
Industrial Dom. Consum	0	0	0	0	0	0	(1000 MT)
Food Use Dom. Consump.	0	0	0	0	0	0	(1000 MT)
Feed Waste Dom. Consum	300	300	350	350	0	360	(1000 MT)
TOTAL Dom. Consumption	300	300	350	350	0	360	(1000 MT)
Ending Stocks	4	4	4	4	0	4	(1000 MT)
TOTAL DISTRIBUTION	1152	1152	1304	1304	0	1324	(1000 MT)
Calendar Year Imports	0	0	0	0	0	0	(1000 MT)
Calendar Yr Imp. U.S.	0	0	0	0	0	0	(1000 MT)
Calendar Year Exports	500	618	450	919	0	950	(1000 MT)
Calndr Yr Exp. to U.S.	0	0	0	0	0	0	(1000 MT)

**Sunflower Seed Meal Export Trade Matrix**

Time Period	Sept.-Aug.	Units:	1 MT
Exports for:	MY 2001/2002		MY 2002/2003
U.S.		U.S.	
Others		Others	
Belarus	107,558	Poland	179,914
Poland	87,177	Belarus	167,828
Switzerland	82,643	Switzerland	126,754
Latvia	56,216	Latvia	95,921
Russian Federation	50,135	Morocco	45,534
Lithuania	33,395	Israel	45,293
Morocco	32,163	Italy	42,358
Italy	30,818	Lithuania	40,475
Hungary	30,037	Hungary	34,843
Israel	23,659	Turkey	21,797
<b>Total for Others</b>	<b>533,801</b>	<b>Total for Others</b>	<b>800,716</b>
Others not Listed	43,773	Others not Listed	47,659
<b>Grand Total</b>	<b>577,574</b>	<b>Grand Total</b>	<b>848,375</b>

*Data Source: State Statistics Committee of Ukraine*

Note: Exports of sunflower seed meal increased from 452,346 MT in Sep. 02-Feb. 03 to 524,554 MT in Sep. 03-Feb. 04

**Sunflower Seed Meal Prices Table**

Prices in	US\$	per uom	1 MT
Year	2003	2004	% Change
Jan	67.51	128.49	90%
Feb	65.61	128.52	96%
Mar	65.61	128.53	96%
Apr	80.62	131.36	63%
May	91.88		
Jun	101.26		
Jul	108.78		
Aug	106.91		
Sep	101.28		
Oct	103.15		
Nov	117.22		
Dec	128.48		

Domestic EXW offer price for <37% protein meal

*Data source: APK-Inform (www.agrimarket.info); Prices as of last Friday of each month*

## Soybean Meal PSD Table

Ukraine							
Meal, Soybean							
	2002	Revised	2003	Estimate	2004	Forecast	UOM
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	
Market Year Begin		09/2002		09/2003		09/2004	MM/YYYY
Crush	100	100	210	152	0	195	(1000 MT)
Extr. Rate, 999.9999	0.7800	0.7800	0.7762	0.7763	0.0000	0.7795	(PERCENT)
Beginning Stocks	1	1	1	1	1	1	(1000 MT)
Production	78	78	163	118	0	152	(1000 MT)
MY Imports	80	80	70	90	0	100	(1000 MT)
MY Imp. from U.S.	6	6	5	3	0	3	(1000 MT)
MY Imp. from the EC	30	30	20	20	0	20	(1000 MT)
TOTAL SUPPLY	159	159	234	209	1	253	(1000 MT)
MY Exports	0	0	10	1	0	1	(1000 MT)
MY Exp. to the EC	0	0	0	0	0	0	(1000 MT)
Industrial Dom. Consum	0	0	0	0	0	0	(1000 MT)
Food Use Dom. Consump.	0	0	0	0	0	0	(1000 MT)
Feed Waste Dom. Consum	158	158	223	207	0	250	(1000 MT)
TOTAL Dom. Consumption	158	158	223	207	0	250	(1000 MT)
Ending Stocks	1	1	1	1	0	2	(1000 MT)
TOTAL DISTRIBUTION	159	159	234	209	0	253	(1000 MT)
Calendar Year Imports	86	86	75	75	0	110	(1000 MT)
Calendar Yr Imp. U.S.	18	10	10	1	0	5	(1000 MT)
Calendar Year Exports	0	4	0	1	0	1	(1000 MT)
CalIndr Yr Exp. to U.S.	0	0	0	0	0	0	(1000 MT)

## Soybean Meal Import Trade Matrix

Time Period	Sept.-Aug.	Units:	1 MT
Imports for:	MY 2001/2002		MY 2002/2003
U.S.	12,541	U.S.	5,892
Others		Others	
Netherlands	36,024	Brazil	30,561
Germany	14,484	Netherlands	26,540
Brazil	8,274	Argentina	8,173
Latvia	6,446	Switzerland	4,310
Moldova	5,453	Germany	2,710
Switzerland	4,736	Belgium	594
Belgium	2,353	Romania	202
Lithuania	484	Austria	129
Yugoslavia	172	Russian Federation	134
Russian Federation	83	Yugoslavia	96
Total for Others	78,509	Total for Others	73,447
Others not Listed	145	Others not Listed	6,030
Grand Total	78,654	Grand Total	79,478

Data Source: State Statistics Committee of Ukraine

Note: Imports of Soybean Meal in Sep. 03-Feb. 04 slightly decreased to 40,208 MT as compared with 40,623 MT imported in Sep. 02-Feb. 03



**Soybean Meal Prices Table**

Prices in	US\$	per uom	1 MT
Year	2003	2004	% Change
Jan	247.57	338.99	37%
Feb	250.78	330.81	32%
Mar	257.41		
Apr	255.62		
May	259.91		
Jun	260.43		
Jul	253.73		
Aug	262.23		
Sep	246.42		
Oct	258.07		
Nov	280.88		
Dec	317.63		

Average monthly CIF import prices

Data Source: State Statistics Committee of Ukraine

**Average CIF Soybean Meal Import Prices by Major Suppliers, \$/MT**

	Supplier	MY 2001/2002	MY 2002/2003	Change, %
1	Brazil	\$195	\$243	25%
2	Belgium	\$246	\$245	0%
3	Argentina	-	\$248	
4	Germany	\$244	\$250	3%
6	Netherlands	\$251	\$257	2%
7	<b>United States</b>	<b>\$255</b>	<b>\$274</b>	<b>7%</b>

Data Source: State Statistics Committee of Ukraine

## Rapeseed Meal PSD Table

Ukraine							
Meal, Rapeseed							
	2002	Revised	2003	Estimate	2004	Forecast	UOM
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	
Market Year Begin		07/2002		07/2003		07/2004	MM/YYYY
Crush	35	35	13	19	0	45	(1000 MT)
Extr. Rate, 999.9999	0.5714	0.5714	0.6154	0.5789	0.0000	0.5778	(PERCENT)
Beginning Stocks	0	0	0	0	0	0	(1000 MT)
Production	20	20	8	11	0	26	(1000 MT)
MY Imports	0	0	0	0	0	0	(1000 MT)
MY Imp. from U.S.	0	0	0	0	0	0	(1000 MT)
MY Imp. from the EC	0	0	0	0	0	0	(1000 MT)
TOTAL SUPPLY	20	20	8	11	0	26	(1000 MT)
MY Exports	12	12	4	4	0	15	(1000 MT)
MY Exp. to the EC	0	8	0	1	0	10	(1000 MT)
Industrial Dom. Consum	0	0	0	0	0	0	(1000 MT)
Food Use Dom. Consump.	0	0	0	0	0	0	(1000 MT)
Feed Waste Dom. Consum	8	8	4	7	0	11	(1000 MT)
TOTAL Dom. Consumption	8	8	4	7	0	11	(1000 MT)
Ending Stocks	0	0	0	0	0	0	(1000 MT)
TOTAL DISTRIBUTION	20	20	8	11	0	26	(1000 MT)
Calendar Year Imports	0	0	0	0	0	0	(1000 MT)
Calendar Yr Imp. U.S.	0	0	0	0	0	0	(1000 MT)
Calendar Year Exports	14	14	4	4	0	15	(1000 MT)
Calndr Yr Exp. to U.S.	0	0	0	0	0	0	(1000 MT)

## Rapeseed Meal Export Trade Matrix

Time Period	July-June	Units:	1 MT
Exports for:	MY 2001/2002		MY 2002/2003
U.S.	0	U.S.	0
Others		Others	
Switzerland	9,187	Lithuania	5,783
Israel	6,289	Israel	4,739
Lithuania	3,811	Poland	1,001
Poland	2,689	Latvia	764
Estonia	1,993	Estonia	108
Latvia	435		
Hungary	57		
Total for Others	24,461	Total for Others	12,396
Others not Listed	0	Others not Listed	
Grand Total	24,461	Grand Total	12,396

Data Source: State Statistics Committee of Ukraine

Note: Exports of rapeseed meal declined from 12,396 MT in Jul. 02-Feb. 03 to 3,105 MT in Jul. 03-Feb. 04 due to lower domestic production.

## Sunflower Seed Oil PSD Table

Ukraine Oil, Sunflowerseed							
	2002	Revised	2003	Estimate	2004	Forecast	UOM
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	
Market Year Begin		09/2002		09/2003		09/2004	MM/YYYY
Crush	2800	2800	3200	3200	0	3070	(1000 MT)
Extr. Rate, 999.9999	0.4286	0.4286	0.4063	0.4063	0.0000	0.4137	(PERCENT)
Beginning Stocks	10	10	19	19	20	20	(1000 MT)
Production	1200	1200	1300	1300	0	1270	(1000 MT)
MY Imports	0	0	0	0	0	0	(1000 MT)
MY Imp. from U.S.	0	0	0	0	0	0	(1000 MT)
MY Imp. from the EC	0	0	0	0	0	0	(1000 MT)
TOTAL SUPPLY	1210	1210	1319	1319	20	1290	(1000 MT)
MY Exports	911	911	950	950	0	910	(1000 MT)
MY Exp. to the EC	210	250	250	300	0	300	(1000 MT)
Industrial Dom. Consum	10	10	10	10	0	10	(1000 MT)
Food Use Dom. Consump.	270	270	339	339	0	350	(1000 MT)
Feed Waste Dom. Consum	0	0	0	0	0	0	(1000 MT)
TOTAL Dom. Consumption	280	280	349	349	0	360	(1000 MT)
Ending Stocks	19	19	20	20	0	20	(1000 MT)
TOTAL DISTRIBUTION	1210	1210	1319	1319	0	1290	(1000 MT)
Calendar Year Imports	0	0	0	0	0	0	(1000 MT)
Calendar Yr Imp. U.S.	0	0	0	0	0	0	(1000 MT)
Calendar Year Exports	600	566	600	924	0	960	(1000 MT)
Calndr Yr Exp. to U.S.	0	0	0	0	0	0	(1000 MT)

## Sunflower Seed Oil Export Trade Matrix

Time Period	Sept.-Aug.	Units:	1 MT
Exports for:	MY 2001/2002		MY 2002/2003
U.S.	0	U.S.	14,775
Others		Others	
Switzerland	84,155	Switzerland	305,107
Russian Federation	84,040	Russian Federation	144,577
Cyprus	39,669	Italy	65,542
Italy	39,417	Netherlands	50,138
Kazakhstan	31,749	Algeria	44,981
Netherlands	27,031	Turkey	32,677
Austria	26,434	Austria	29,320
Turkey	23,504	Cyprus	26,591
Belarus	13,822	Great Britain	23,175
Algeria	12,350	Egypt	19,930
Total for Others	382,171	Total for Others	742,038
Others not Listed	43,284	Others not Listed	154,664
Grand Total	425,455	Grand Total	911,477

Data Source: State Statistics Committee of Ukraine

Note: Exports of sunflower seed oil slightly increased from 436,617 MT in Sep. 02-Feb. 03 to 437,639 MT in Sep. 03-Feb. 04

**Sunflower Seed Oil Prices Table**

Prices in	US\$	per uom	1 MT
Year	2003	2004	% Change
Jan	230.64	261.67	13%
Feb	230.57	290.81	26%
Mar	217.45	286.15	32%
Apr	220.29	274.92	25%
May	249.39		
Jun	296.28		
Jul	300.09		
Aug	178.19		
Sep	178.18		
Oct	237.25		
Nov	230.68		
Dec	214.76		

Data source: APK-Inform ([www.agrimarket.info](http://www.agrimarket.info)); Prices as of last Friday of each month

**Soybean Oil PSD Table**

Ukraine Oil, Soybean							
	2002	Revised	2003	Estimate	2004	Forecast	UOM
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	
Market Year Begin		09/2002		09/2003		09/2004	MM/YYYY
Crush	100	100	210	152	0	195	(1000 MT)
Extr. Rate, 999.9999	0.1700	0.1700	0.1619	0.1711	0.0000	0.1744	(PERCENT)
Beginning Stocks	0	0	0	0	0	0	(1000 MT)
Production	17	17	34	26	0	34	(1000 MT)
MY Imports	1	1	0	0	0	0	(1000 MT)
MY Imp. from U.S.	0	1	0	0	0	0	(1000 MT)
MY Imp. from the EC	0	0	0	0	0	0	(1000 MT)
TOTAL SUPPLY	18	18	34	26	0	34	(1000 MT)
MY Exports	4	4	5	3	0	5	(1000 MT)
MY Exp. to the EC	0	4	0	1	0	2	(1000 MT)
Industrial Dom. Consum	0	0	0	0	0	0	(1000 MT)
Food Use Dom. Consump.	14	14	29	23	0	29	(1000 MT)
Feed Waste Dom. Consum	0	0	0	0	0	0	(1000 MT)
TOTAL Dom. Consumption	14	14	29	23	0	29	(1000 MT)
Ending Stocks	0	0	0	0	0	0	(1000 MT)
TOTAL DISTRIBUTION	18	18	34	26	0	34	(1000 MT)
Calendar Year Imports	1	2	1	0	0	0	(1000 MT)
Calendar Yr Imp. U.S.	0	1	0	0	0	0	(1000 MT)
Calendar Year Exports	1	1	4	4	0	5	(1000 MT)
CalIndr Yr Exp. to U.S.	0	0	0	0	0	0	(1000 MT)

## Rapeseed Oil PSD Table

Ukraine Oil, Rapeseed							
	2002	Revised	2003	Estimate	2004	Forecast	UOM
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	
<b>Market Year Begin</b>		07/2002		07/2003		07/2004	MM/YYYY
<b>Crush</b>	35	35	13	19	0	45	(1000 MT)
<b>Extr. Rate, 999.9999</b>	0.3714	0.3714	0.3846	0.3684	0.0000	0.3778	(PERCENT)
<b>Beginning Stocks</b>	0	0	0	0	0	0	(1000 MT)
<b>Production</b>	13	13	5	7	0	17	(1000 MT)
<b>MY Imports</b>	0	0	0	0	0	0	(1000 MT)
<b>MY Imp. from U.S.</b>	0	0	0	0	0	0	(1000 MT)
<b>MY Imp. from the EC</b>	0	0	0	0	0	0	(1000 MT)
<b>TOTAL SUPPLY</b>	13	13	5	7	0	17	(1000 MT)
<b>MY Exports</b>	7	7	0	0	0	5	(1000 MT)
<b>MY Exp. to the EC</b>	0	2	0	0	0	2	(1000 MT)
<b>Industrial Dom. Consum</b>	0	0	0	0	0	0	(1000 MT)
<b>Food Use Dom. Consump.</b>	6	6	5	7	0	12	(1000 MT)
<b>Feed Waste Dom. Consum</b>	0	0	0	0	0	0	(1000 MT)
<b>TOTAL Dom. Consumption</b>	6	6	5	7	0	12	(1000 MT)
<b>Ending Stocks</b>	0	0	0	0	0	0	(1000 MT)
<b>TOTAL DISTRIBUTION</b>	13	13	5	7	0	17	(1000 MT)
<b>Calendar Year Imports</b>	0	0	0	0	0	0	(1000 MT)
<b>Calendar Yr Imp. U.S.</b>	0	0	0	0	0	0	(1000 MT)
<b>Calendar Year Exports</b>	6	6	1	1	0	5	(1000 MT)
<b>Calndr Yr Exp. to U.S.</b>	0	0	0	0	0	0	(1000 MT)

## Rapeseed Oil Export Trade Matrix

Time Period	July-June	Units:	1 MT
<b>Exports for:</b>	<b>MY 2001/2002</b>		
<b>U.S.</b>	<b>0</b>	<b>U.S.</b>	<b>0</b>
Others		Others	
Algeria	2,996	Russian Federation	4,374
Russian Federation	2,771	Lithuania	1,980
Lithuania	1,748	Romania	125
Turkey	1,510	Belarus	119
Switzerland	1,462	Kazakhstan	65
Czech Republic	274		
Belarus	135		
Tajikistan	10		
Estonia	6		
<b>Total for Others</b>	<b>10,912</b>	<b>Total for Others</b>	<b>6,663</b>
Others not Listed		Others not Listed	
<b>Grand Total</b>	<b>10,912</b>	<b>Grand Total</b>	<b>6,663</b>

Data Source: State Statistics Committee of Ukraine

Note: Exports of rapeseed oil decreased from 6,402 MT in Jul. 02-Feb. 03 to 147 MT in Jul. 03-Feb. 04